



Filing ID #10024606

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Liz Watson  
**Status:** Congressional Candidate  
**State/District:** IN09

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 09/4/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment ⇒ BND [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment ⇒ BNDX [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment ⇒ EMB [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment ⇒ LQD [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment ⇒ VBR [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment ⇒ VEA [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Betterment ⇒ VOE [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment ⇒	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VTI [EF]					
Betterment ⇒ VTV [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment ⇒ VWO [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab ⇒ Organovo Holdings, Inc. (ONVO) [ST]	SP	\$1 - \$1,000	None		
Charles Schwab ⇒ SEI Investments Company (SEIC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ SWBGX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ swissx [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab ⇒ SWPPX [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Maryland 529 ⇒ T.Rowe Price Portfolio 2024 [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Maryland 529 ⇒ T.Rowe Price Portfolio 2027 [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
NY 529 ⇒ VO [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
NY 529 ⇒ VTI [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Phoenix Wealth Management ⇒ FHBRX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Phoenix Wealth Management ⇒ PSGAX [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Phoenix Wealth Management ⇒ PSGAX [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Phoenix Wealth Management ⇒ TEPLX [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab IRA ⇒ FNDF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab IRA ⇒ VNQI [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sharebuilder ⇒ BND [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Sharebuilder ⇒ VEA [EF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Sharebuilder ⇒ VNQ [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sharebuilder ⇒ VO [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sharebuilder ⇒ VTV [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sharebuilder ⇒ VUG [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sharebuilder ⇒ VWO [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
State of Alaska Supplemental Annuity ⇒ Alaska Balanced Trust [OT]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: "It is a common trust fund established by the T. Rowe Price Trust Company under Maryland banking law, and its units are exempt from registration..."					
Vanguard Investments ⇒ VTIVX [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Voya ⇒ VTTHX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Mehri & Skalet, PLLC	Spouse salary	\$200,000.00	\$200,000.00
Indiana University	Salary	\$5,000.00	\$5,000.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Chase	November 2014	Mortgage	\$250,001 - \$500,000
SP	Wells Fargo	July 2017	home mortgage	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Betterment (Owner: SP)
- Charles Schwab
- Charles Schwab (Owner: SP)  
LOCATION: US
- Maryland 529 (Owner: JT)  
LOCATION: MD
- NY 529  
LOCATION: NY
- Phoenix Wealth Management
- Schwab IRA (Owner: SP)
- Sharebuilder (Owner: SP)

- State of Alaska Supplemental Annuity
- Vanguard Investments
- Voya

### **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

### **CERTIFICATION AND SIGNATURE**

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Liz Watson , 09/4/2018